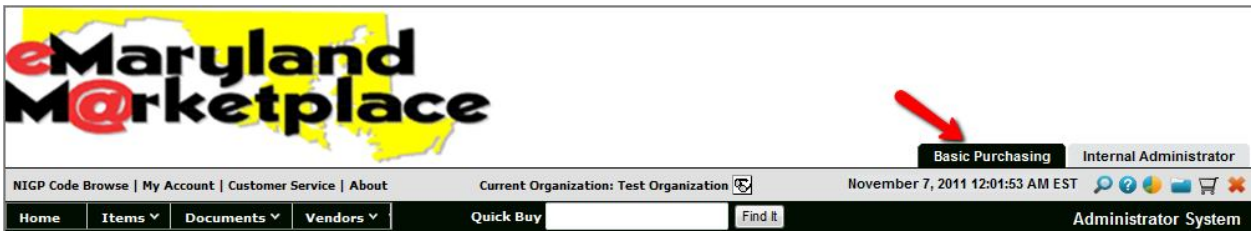
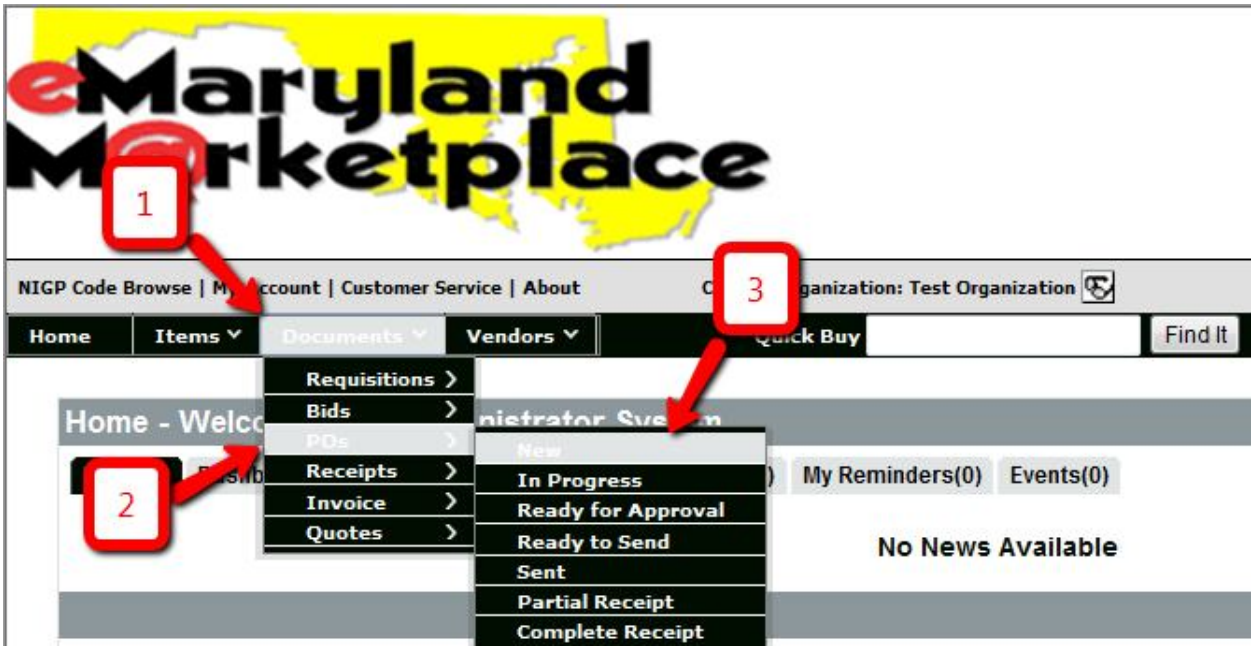
- STEP 1**: Login as a Procurement Officer and confirm your role.**
    - If role tabs appear along the top-right, make sure that the **Basic Purchasing** tab is highlighted. If not, click that tab.



Step 1: **Expected Results:** The current screen closes and the "Basic Purchasing" Home page screen appears like the image below.
Step 1: **Actual Results:**

- STEP 2**: Create a new Blanket Purchase Order document**
    - From the toolbars, hover your mouse over **Documents**, then **Purchase Orders**, then click **New**.



- The **Create a New Purchase Order** screen will appear.
- Select the **Create a purchase order from scratch** option.
- Select "Blanket" in the **PO Type of the New Purchase Order** box.
- Click **Continue**.

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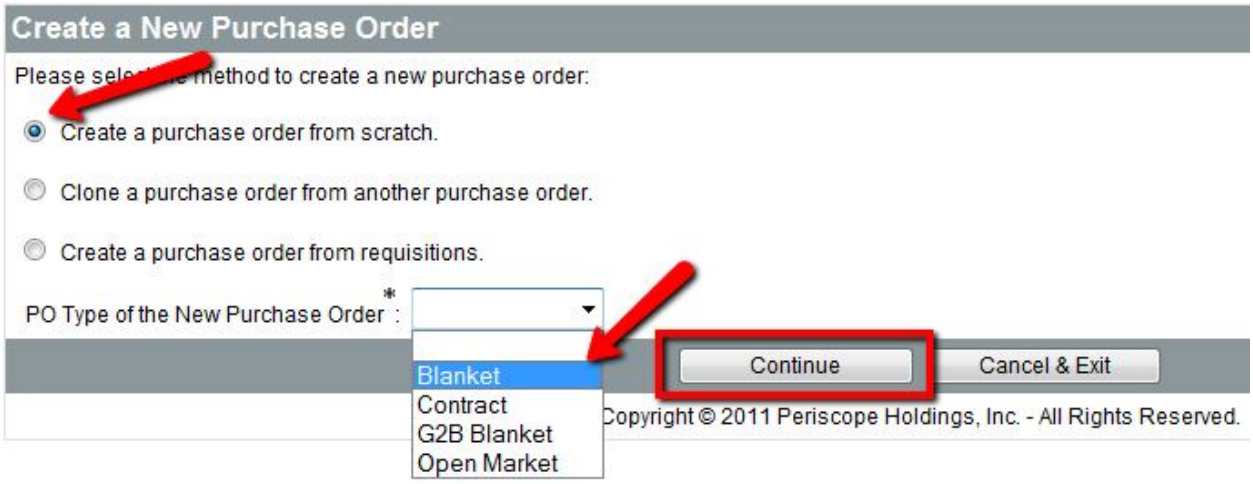

- The **General** tab of the New PO document will appear.

Step 2: **Expected Results:** The **General** tab of the New PO document will appear.
Step 2: **Actual Results:**

- STEP 3: **Complete the General tab of the Purchase Order**
  - Click the **General** tab of the Purchase Order document.
  - There are four fields to complete on the top part of the screen:
    - Short Description – The title of the contract
    - Department – The Department that manages the contract.
    - P-Card Enabled – Check if a P-Card can be used to order against this contract.
    - Type Code – Select the appropriate Purchase Type.

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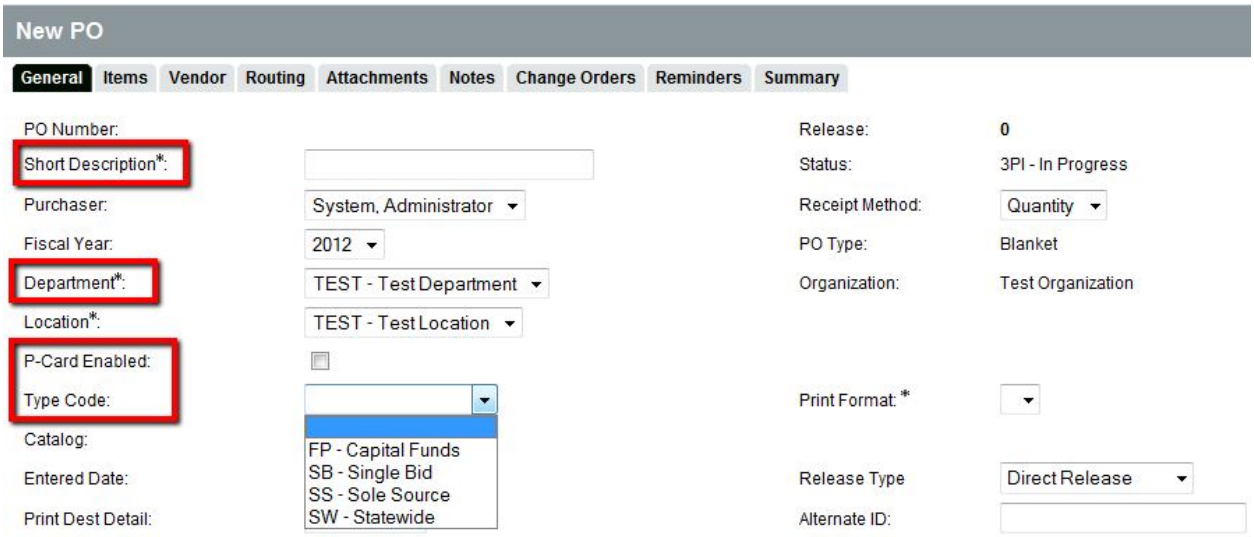

- Scroll down to the bottom of the screen.
- Complete the fields on the bottom part of the screen, starting with **Match Type**.
- Click **Save & Continue**.

- The screen will refresh, and the Purchase Order will have been assigned a number and report a status of "In Progress."

Step 3: **Expected Results:** The **General** tab is saved, document number is assigned and the status becomes "In Progress."
Step 3: **Actual Results:**

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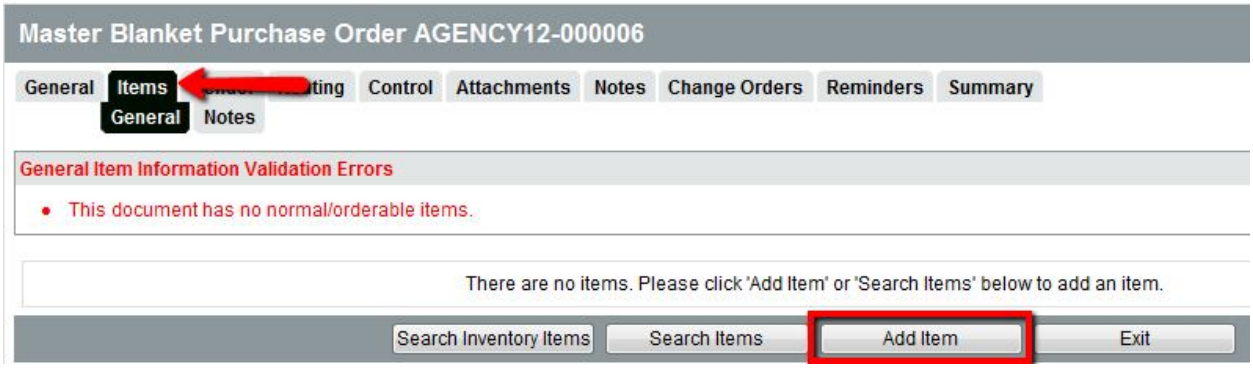
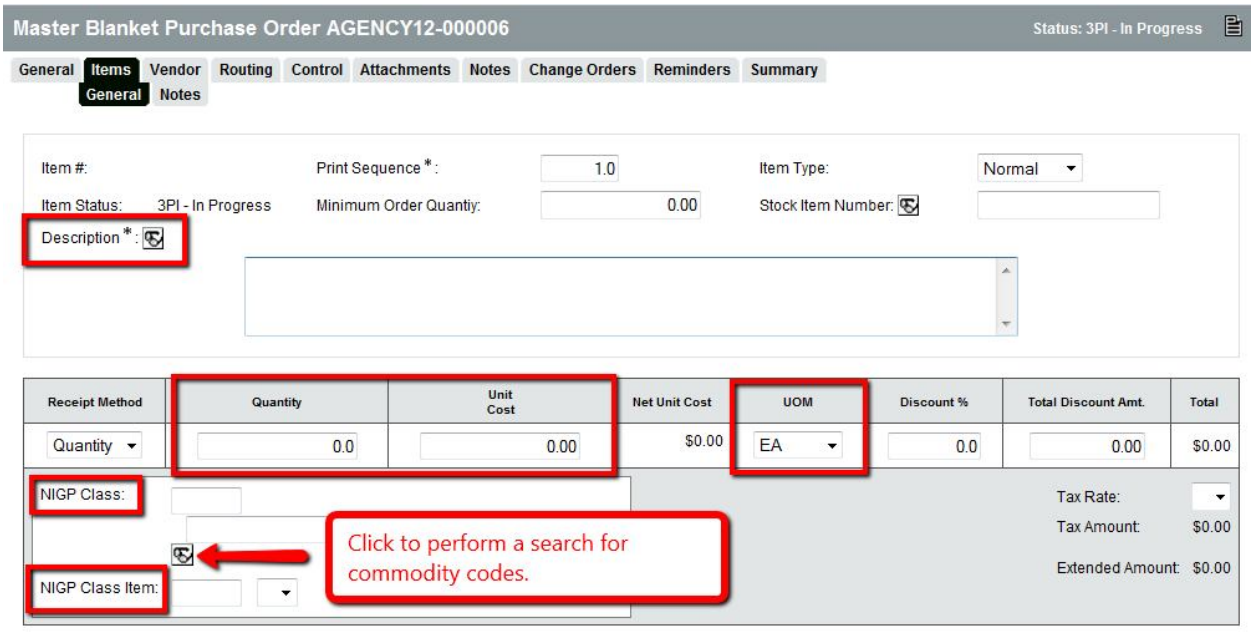
- STEP 4: **Enter the contract line-items.**

  - Click on the **Items** tab.
  - A red validation error will appear that there are no items.
  - Click the **Add Item** button on the bottom of the screen.



  - **Add Item**: Enter a description, quantity, unit cost, unit of measure and commodity code (NIGP Class and Class Item).



  - To search for a commodity code by keyword, click the eyeglass icon as shown above.
  - A pop-up with the **Commodity and Service Codes Search** screen will appear.
  - Enter a **NIGP Keyword** and click **Search**.

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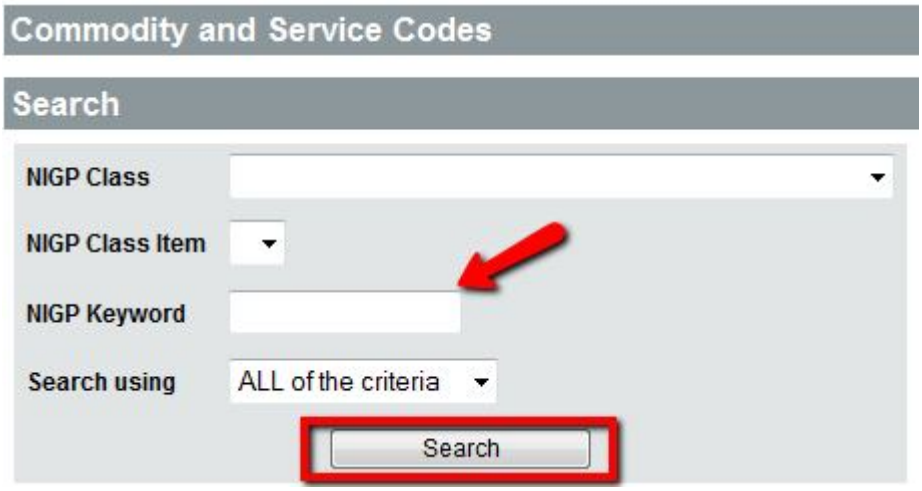
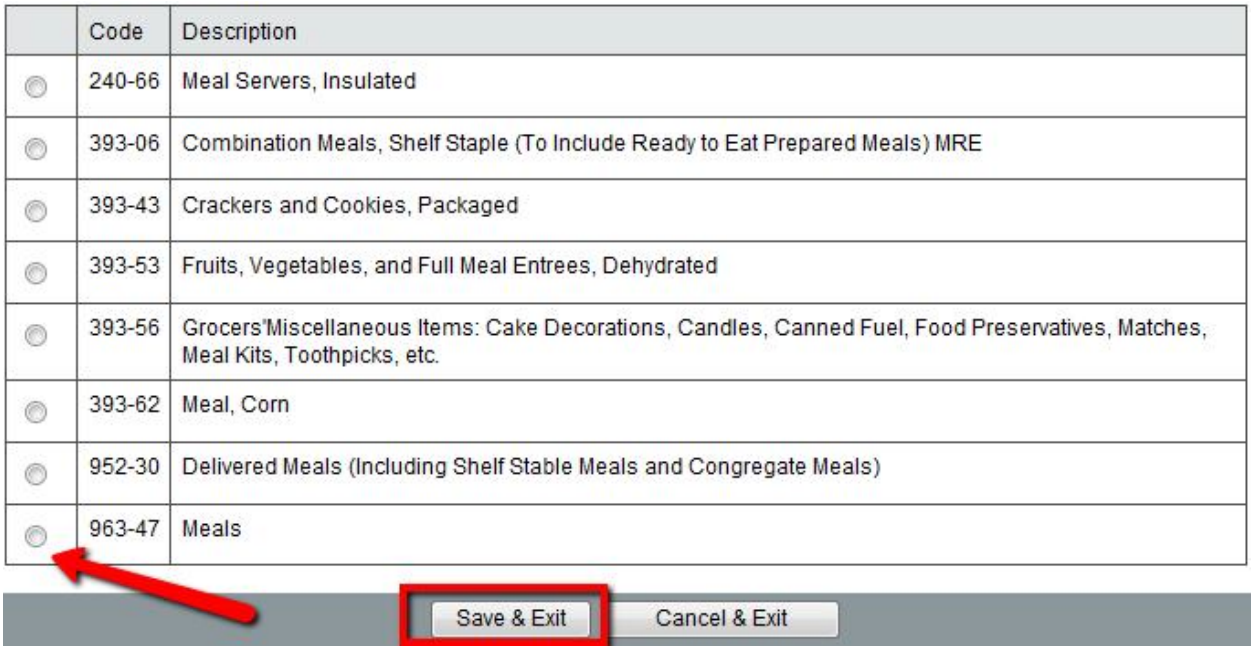


- The matching results will appear below.
- Click the button for the code you would like to use and click **Save & Exit**.



- The Item-detail screen will re-appear.
- To add another line-item, click **Save & Add New**, then repeat this step.
- If you're finished adding items, click **Save & Exit**.

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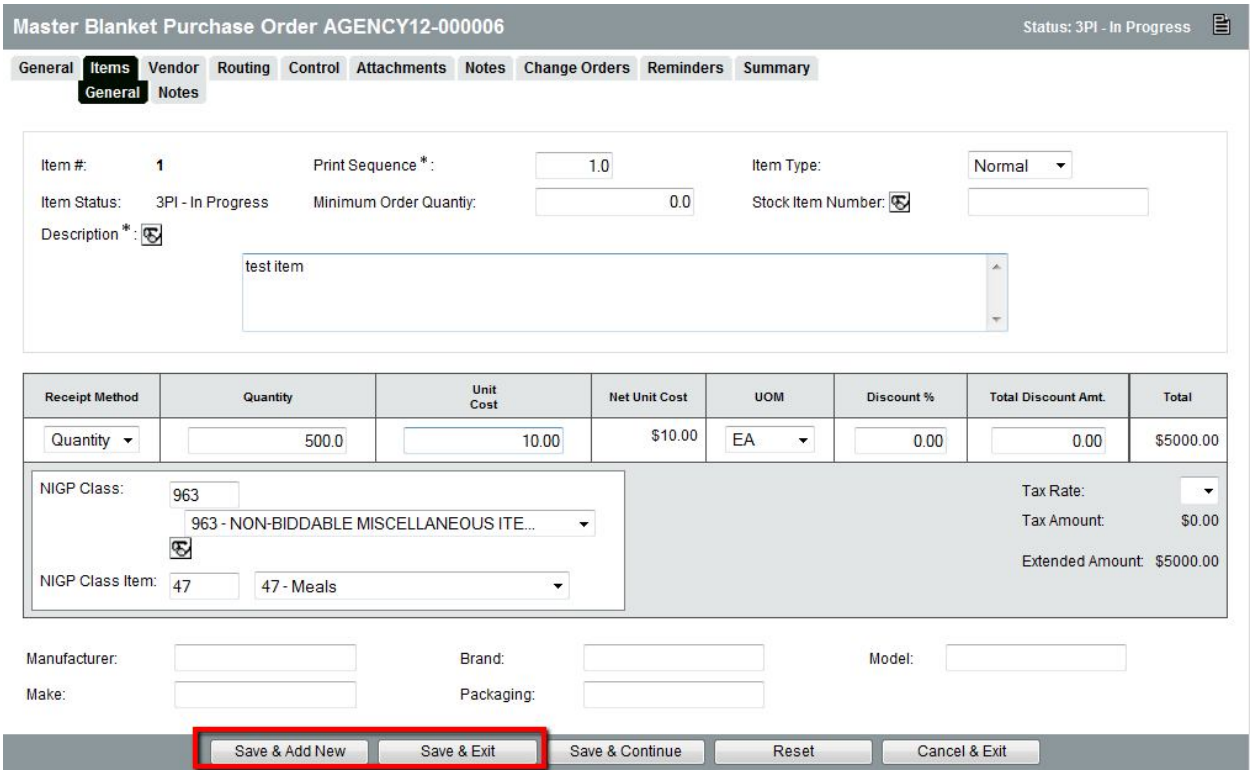
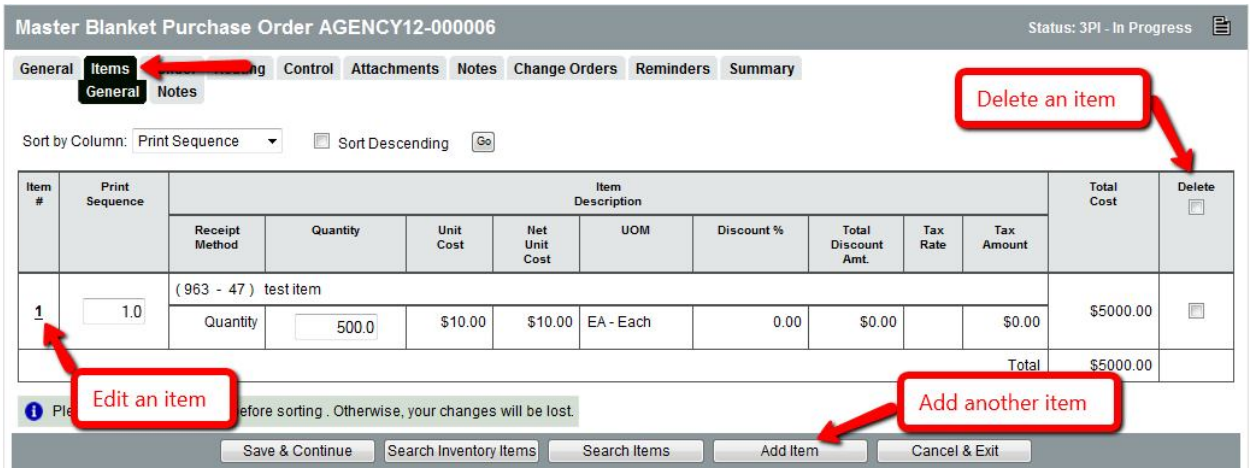


- Review your items from the **Items** tab.
- If desired, edit your list of items.



Step 4: **Expected Results:** Items have been successfully added to the Master Blanket Purchase Order document.
Step 4: **Actual Results:**

- STEP 5: **Search for and select the contractor.**

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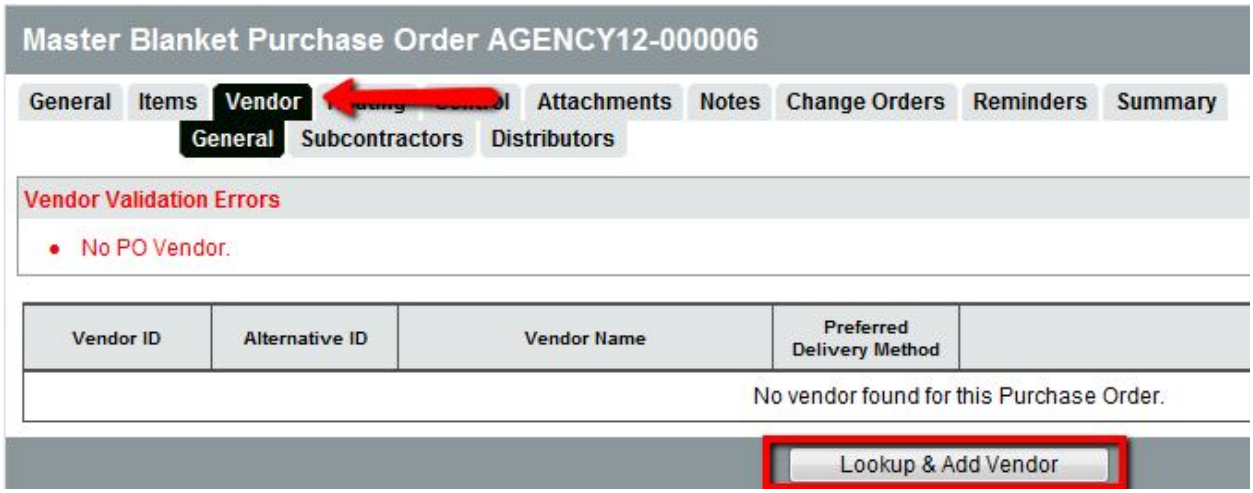
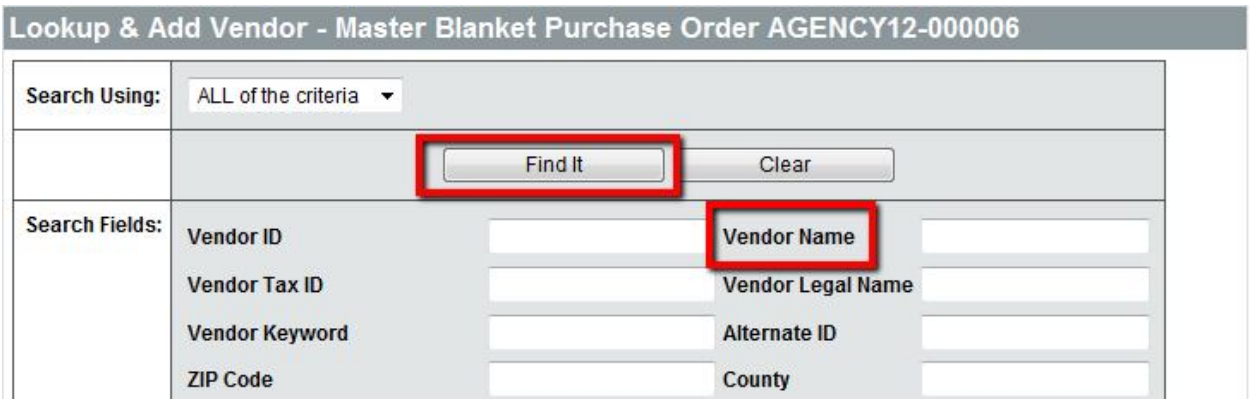
- Click the **Vendor** tab.
- A red validation error will appear reporting that there is no vendor for the PO.
- Click **Lookup & Add Vendor** along the bottom of the screen.



- A pop-up window with the **Lookup & Add Vendor** screen will appear.
- Search using the **Vendor Name** field and click **Find It**.



- Scroll down to the bottom of the screen.
- Select the button next to the vendor that will be the contractor.
- Click the **Add Vendor** button.

- Select the various contract terms - Payment, Freight, etc.

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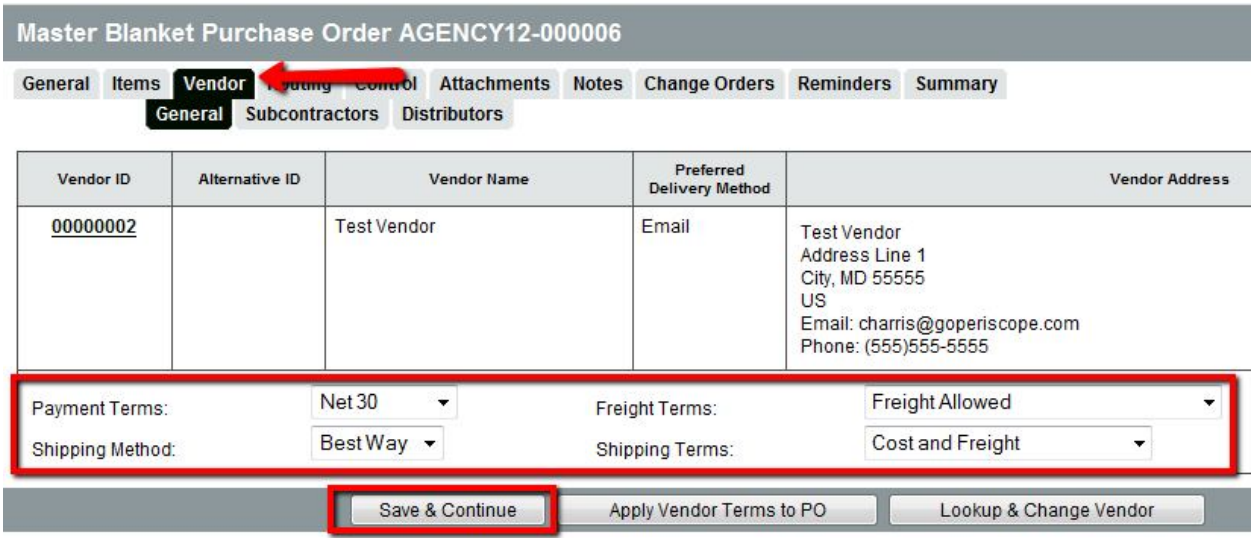
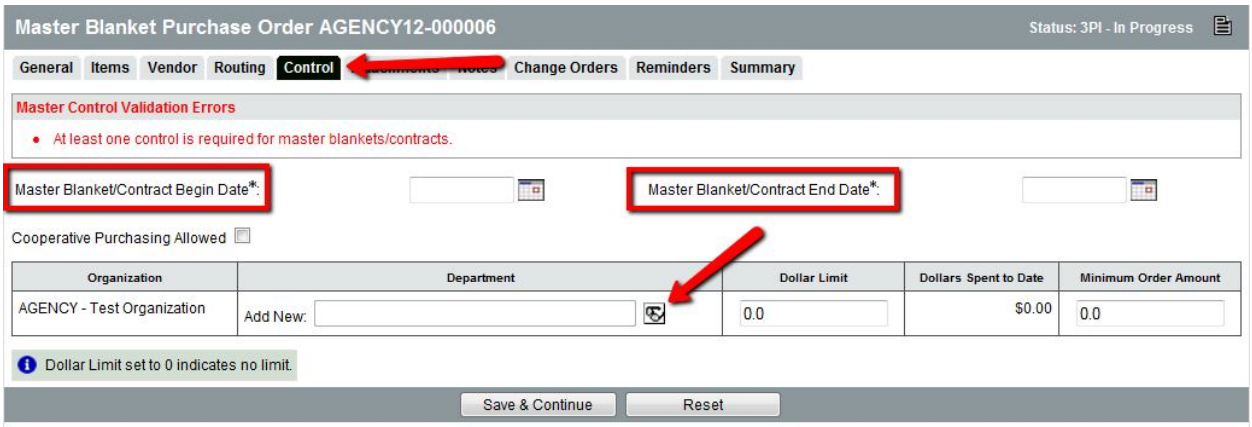
- Click **Save & Continue** .



Step 5: **Expected Results:** The vendor has been selected and contract terms saved.
Step 5: **Actual Results:**

- STEP 6: **Set the contract dates and controls.**

  - Click the **Control** tab of the Purchase Order document.
  - Pick a date for the **Master Blanket/Contract Begin Date**.
  - Pick a date for the **Master Blanket/Contract End Date**.
  - Next, click the eyeglass icon in the **Department** column below.



  - Another window will open with the **Department Lookup** screen.
  - Click the button in the **Select** column for the "Agency Umbrella Master Control" option. This means all parts of your agency can order against the contract.
  - Click the **Select** button on the bottom of the screen.

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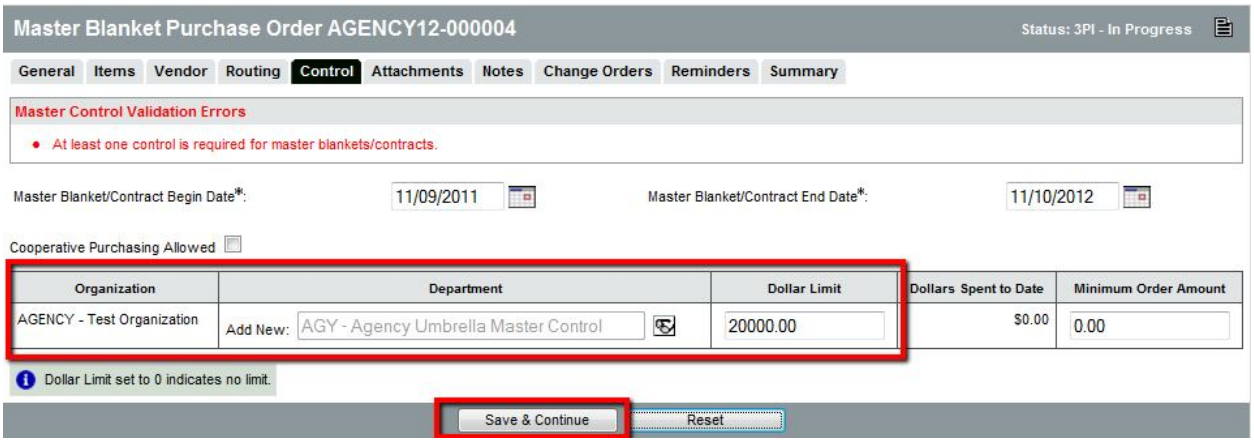
- The **Control** tab will re-appear.
- Enter the Contract Total in the **Dollar Limit** field. This sets the amount that can be spent against the contract.
- Click **Save & Continue**.



Step 6: **Expected Results:** The contract begin and end date is saved. The agency and departments that can order against the contract are set, as well as the total amount that can be spent against the contract.
Step 6: **Actual Results:**

- STEP 7: **Add any contract attachments.**

  - Click the **Attachments** tab of the Purchase Order document.
  - Click the **Add Attachment** button.

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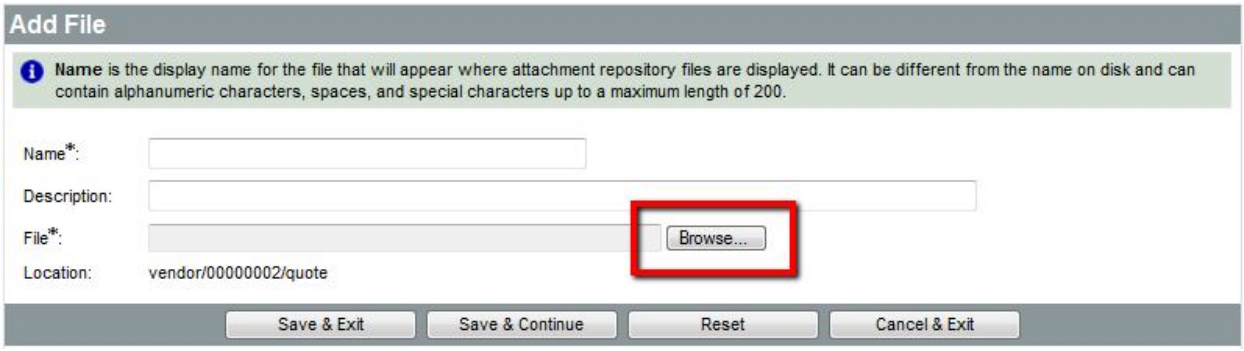
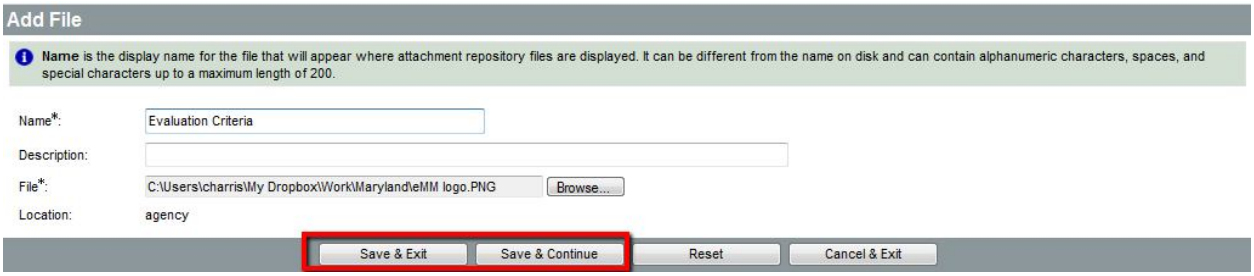
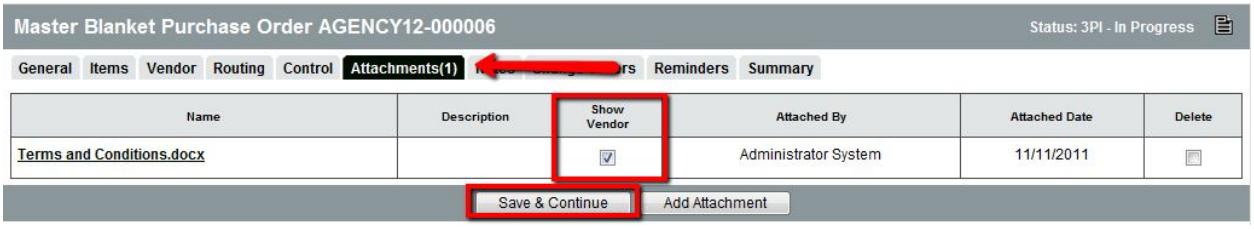
- The **Add File** screen will appear.
- Click the **Browse** button to bring up a directory of your computer.
- Double-click the first file you wish to attach or click the file once, then click **Open**.



- The file directory will then close and the **Add File** screen will re-appear with your file name listed.
- If you wish to attach another file, click **Save & Continue**, then repeat this step. If not, click **Save & Exit** to review the file(s) you've attached and move forward.



- Once back on the **Attachments** tab, the list of your attachments will appear.
- Note the **Show Vendor** check box next to each attachment. When **Show Vendor** is checked, it ensures the attachment is visible to contractor as well as the public when accessing the contract.
- If you make any changes on this screen, click **Save & Continue**.



Step 7: **Expected Results:** Attachments are added to the Master Blanket Purchase Order document.
Step 7: **Actual Results:**

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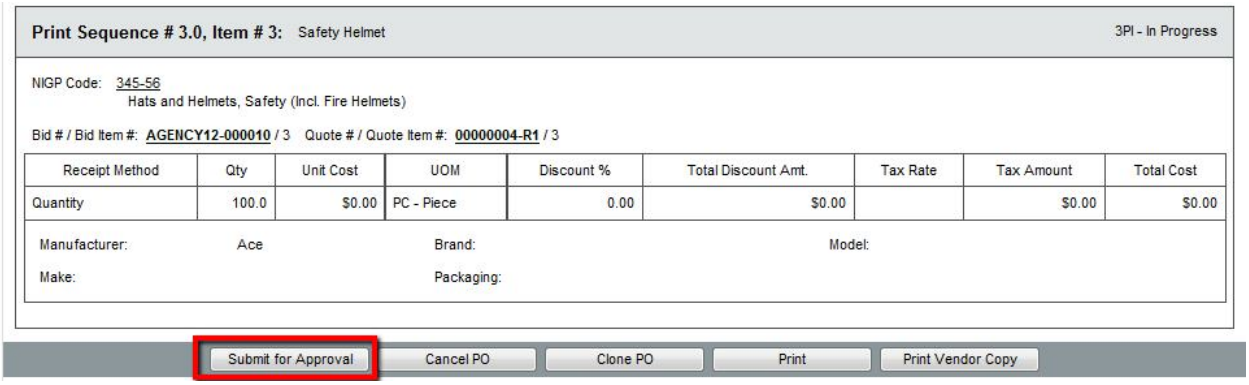
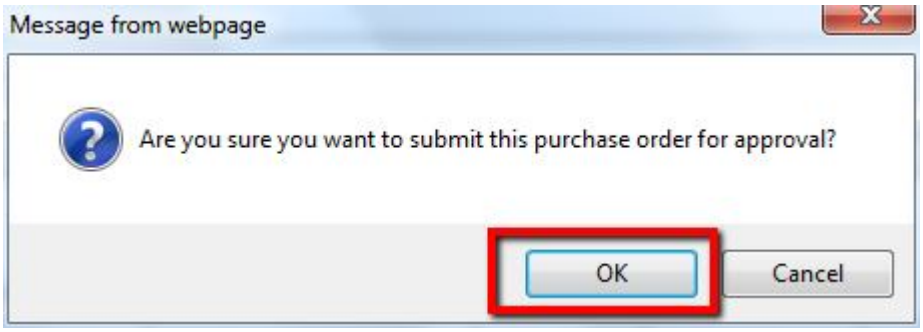
- STEP 8: **Submit the contract for approval.**

    - Click the **Summary** tab.
    - Review the document.

- Click the **Submit for Approval** button on the bottom of the screen.



- A pop-up message will appear asking you to confirm submission of the award recommendation. Click **OK**.



- Next, manually add an approver to review and approve your Bid.

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- Ensure **Manually add approvers** is selected, then choose yourself as the approver and click **Add Approver**.
- Finally, click **Save & Continue**.

- The **Summary** tab of the Master Blanket Purchaser Order document will display. The status is now "Ready for Approval."

Step 8: **Expected Results:** The Master Blanket Purchase Order has been submitted for approval and is in "Ready for Approval" status.
Step 8: **Actual Results:**

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